

INITIAL REQUIREMENTS

Objectives:

- To learn how navigate the menu to find initial requirements and their respective statuses
- To learn how to complete and submit an initial requirement

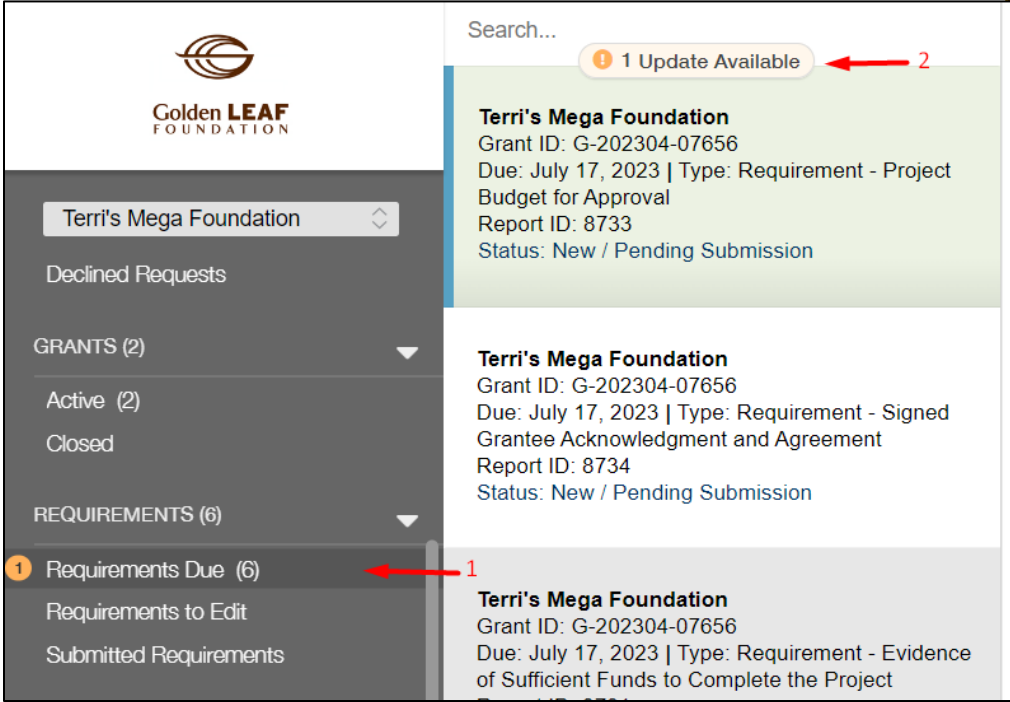
Locating requirements due

1) When you log in to your grant portal account (see quick reference sheet, **How to Log In**, [here](#)), scroll down the menu to the **REQUIREMENTS** section. If there are orange indicators to the left, that means updates have been made. In the example below, one update has been made to **Requirements Due**.

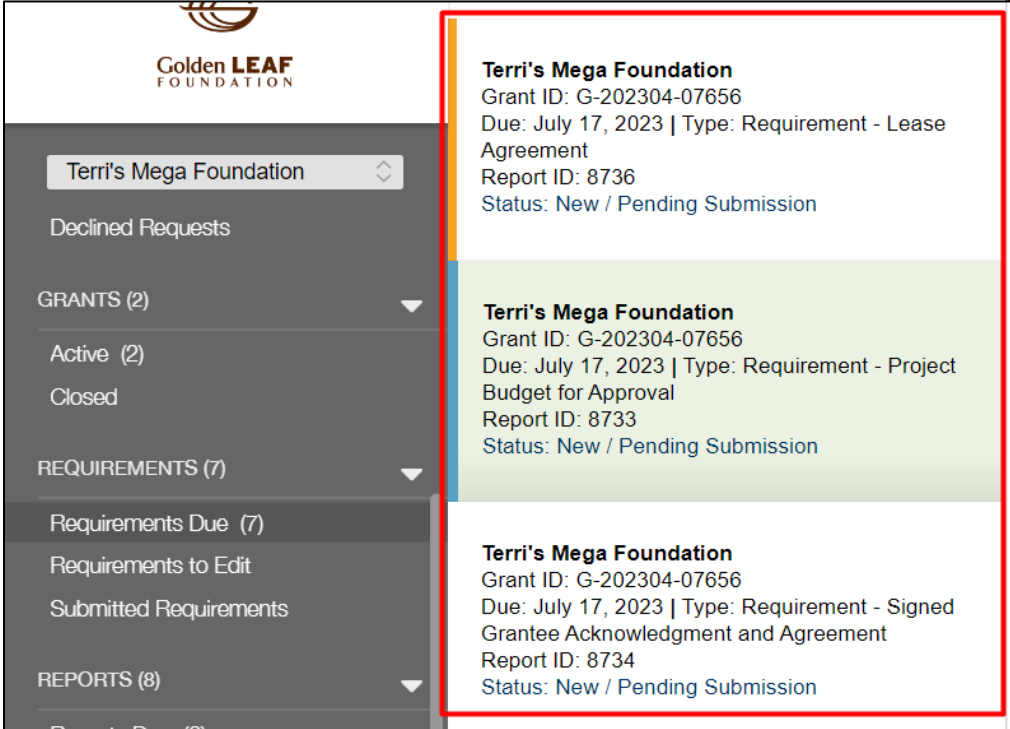
The screenshot displays the Golden LEAF Foundation grant portal interface. On the left is a navigation menu with categories: GRANTS (2), REPORTS (8), and PAYMENTS (6). The 'REQUIREMENTS (6)' category is expanded, showing sub-items: Requirements Due (6), Requirements to Edit, and Submitted Requirements. The 'Requirements Due (6)' item has an orange circle with the number '1' next to it, and a red arrow points to it from the right. The main content area on the right shows a search bar with '1 Update Available' and three requirement entries for 'Terri's Mega Foundation', each with details like Grant ID, Due date, Type, Report ID, and Status.

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2) Click **Requirements Due** then click the update bar indicating, in this example, **1 Update Available**.



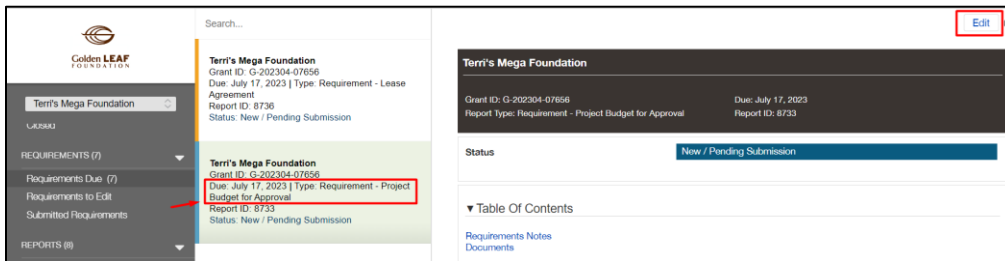
3) Requirements that are due listed to the right of the menu. Shown in this screen shot is a requirement for the lease agreement and a requirement to submit the project budget for approval, both due July 17, 2023.



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- 4) Click the desired requirements, and it will open (to the right) for viewing. As indicated by the arrows in the image below, note the blue and gold bars at the edge of each report. **Blue** indicates the report is being viewed. **Gold** means the item has been updated but not viewed.

You do not need to open the requirement to only upload documents. [Should you choose to open the requirement, click **Edit**, at the upper right corner, to open it.]

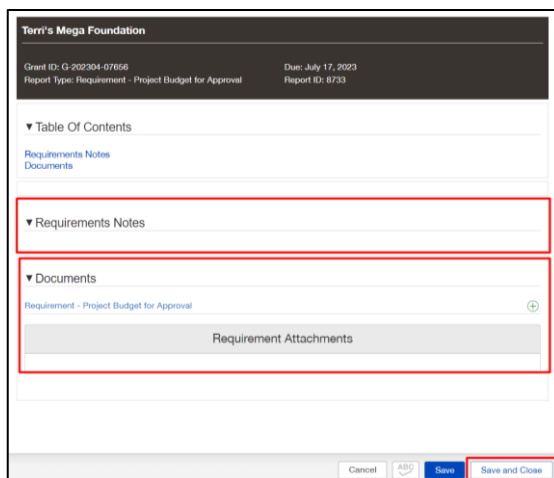


- 5) There are three primary sections to note when you're preparing to submit a requirement.

Requirements Notes: Additional information or explanatory notes will be found here. For example, for "Requirement - Other", you will find the details of what the special requirement or grant condition are.

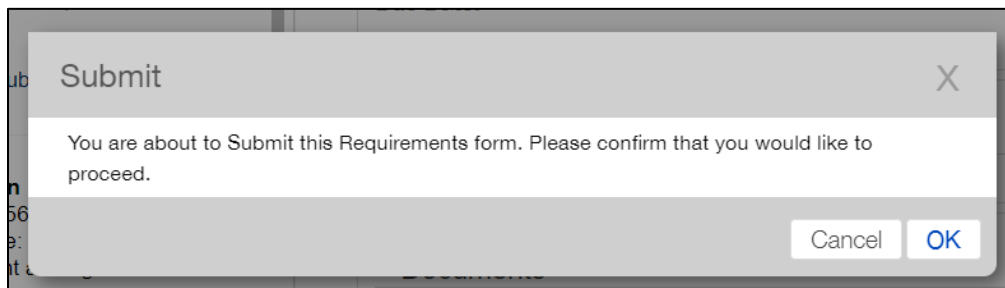
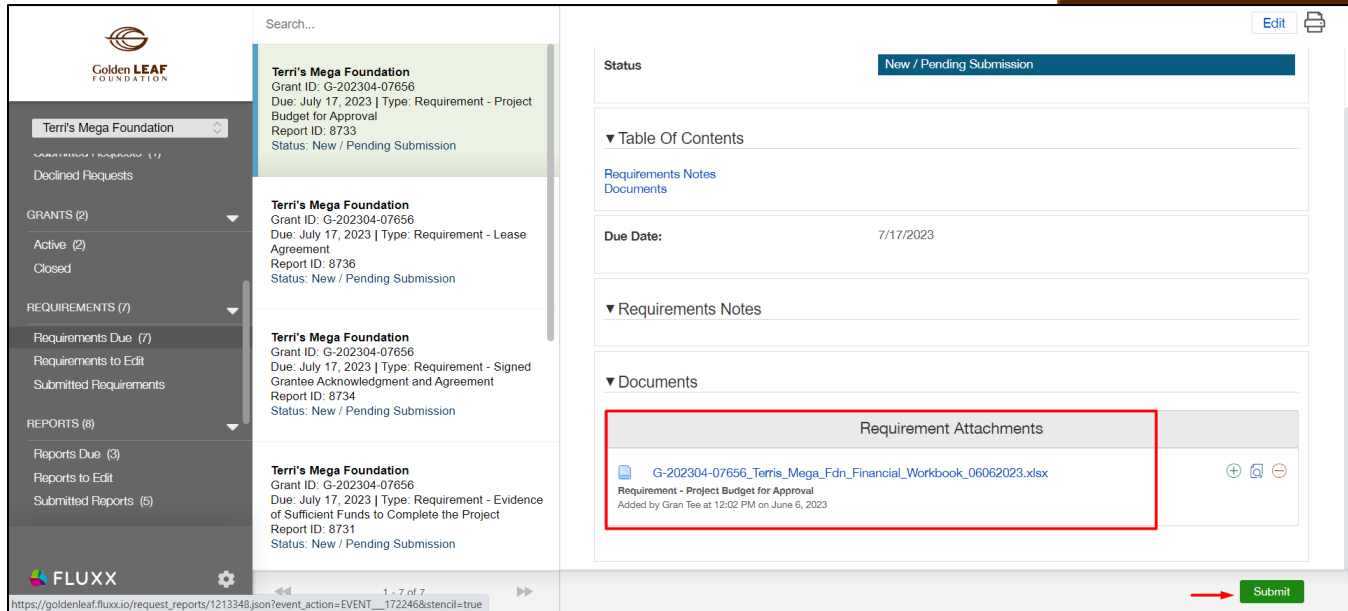
Documents: Upload the document or documents solely related to the specific grant requirement. There is only one document upload opportunity per requirement, so, if there are multiple files to upload, be prepared to upload them at the same time. See [Uploading Documents for Requirements](#).

Cancel/ Save/ Save and Close: This section applies if you have opened the requirement by using the "Edit" button. **You do not need to open the requirement to only upload documents.** Initial requirements are very straightforward, typically requiring only the submission of a single or several documents. Once those documents are uploaded, simply click **Save and Close**, to save and close.

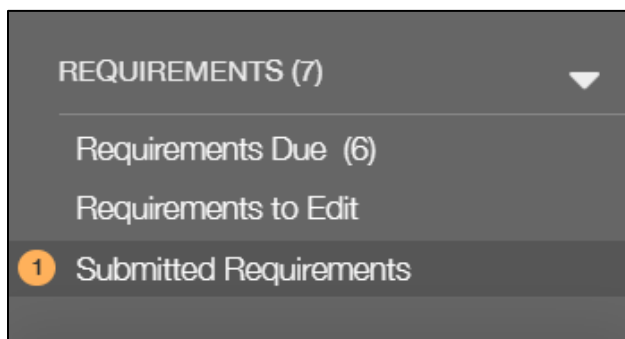


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- 6) Uploaded documents now appear in the “Requirement Attachments” section. Click **Submit** at the bottom right corner of your screen, then click **OK**. Be sure to confirm submission by noting the change of status from “New/Pending Submission” to “Report Submitted”.

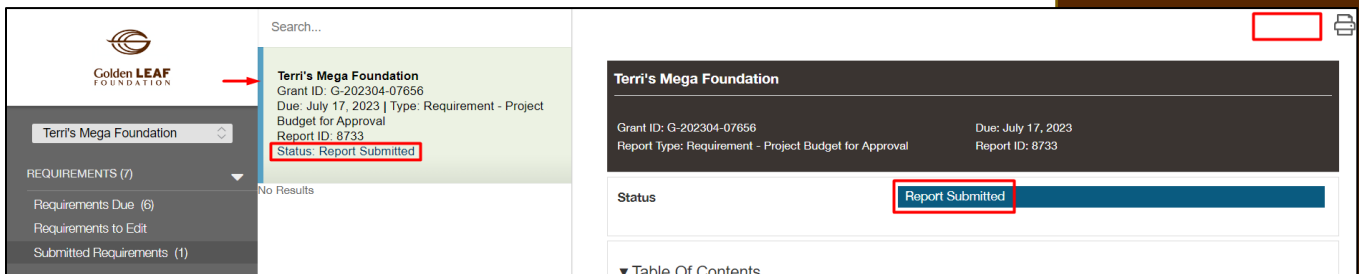
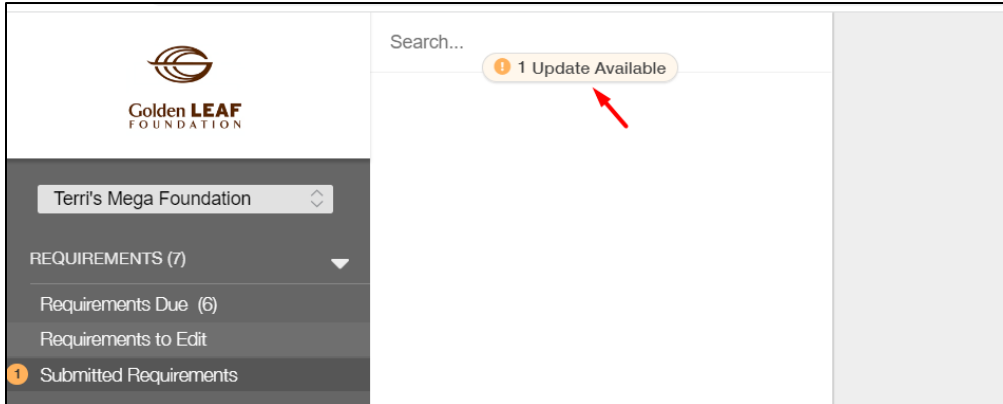


- 7) You should receive an automated e-mail notifying you that your report has been submitted. You can also check the status of your report in the grant portal. You'll see an update dot beside **Submitted Requirements** in the menu.

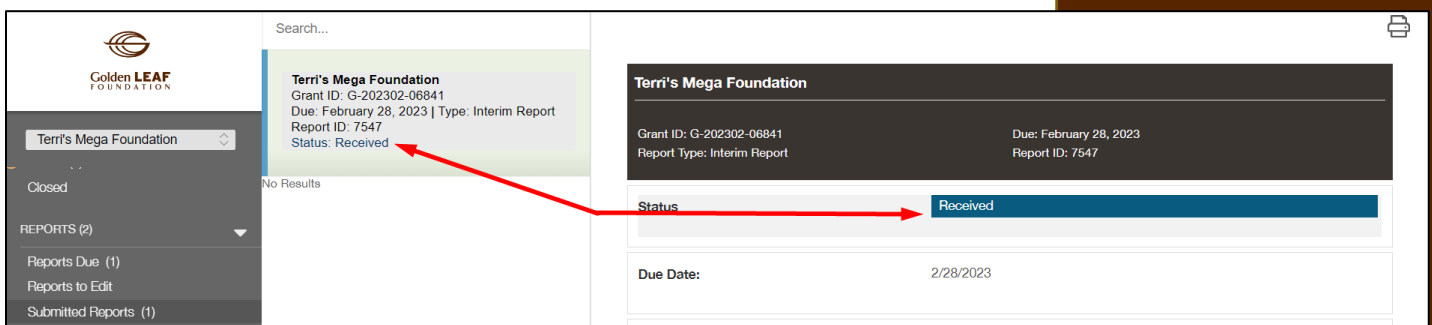


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- 8) Click **Submitted Requirements**, then click the update bar to refresh your list. You can then view your submitted requirements. Note that you no longer have an edit button at the upper right corner of your screen. That is because your report is now in “Report Submitted” status.



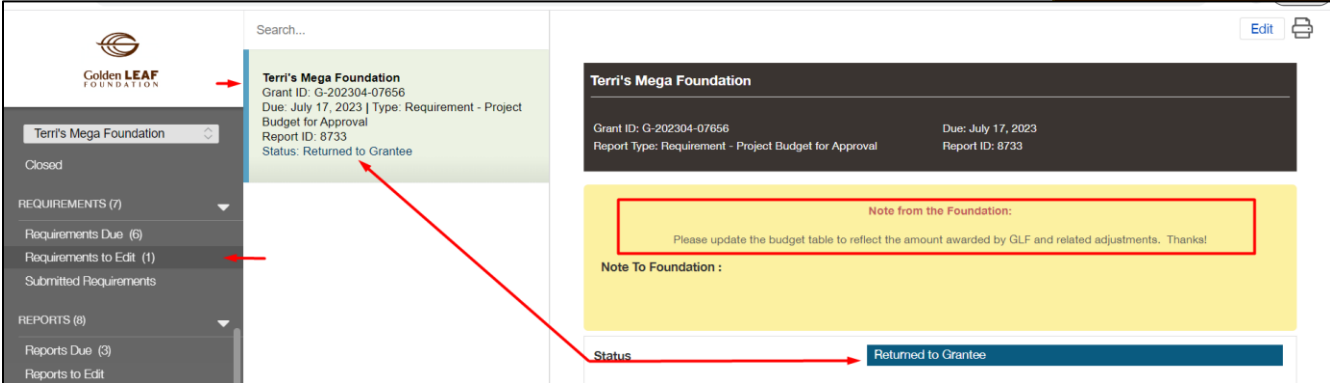
- 9) When your program officer has determined that s/he has the basic information needed to begin review of your requirement, you'll receive an e-mail notification that the requirement has been received. The status bar will change to reflect that. You'll use the same process as in step 8 to see the updated status.



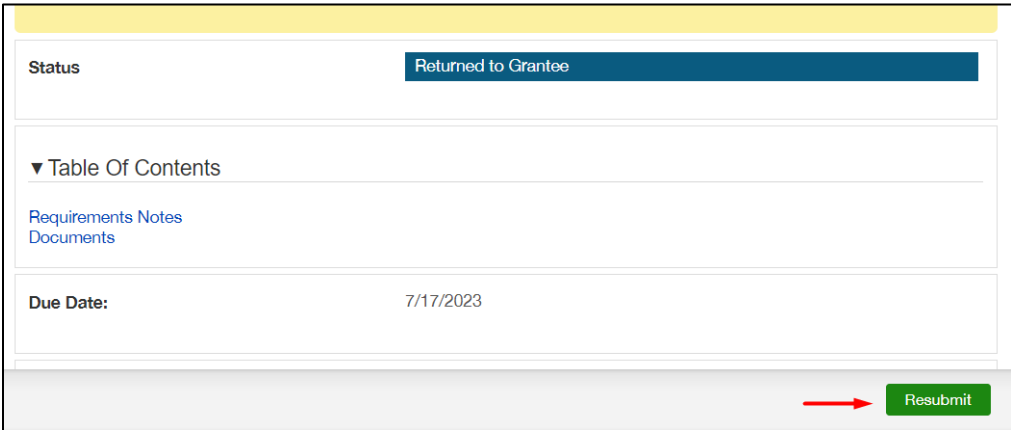
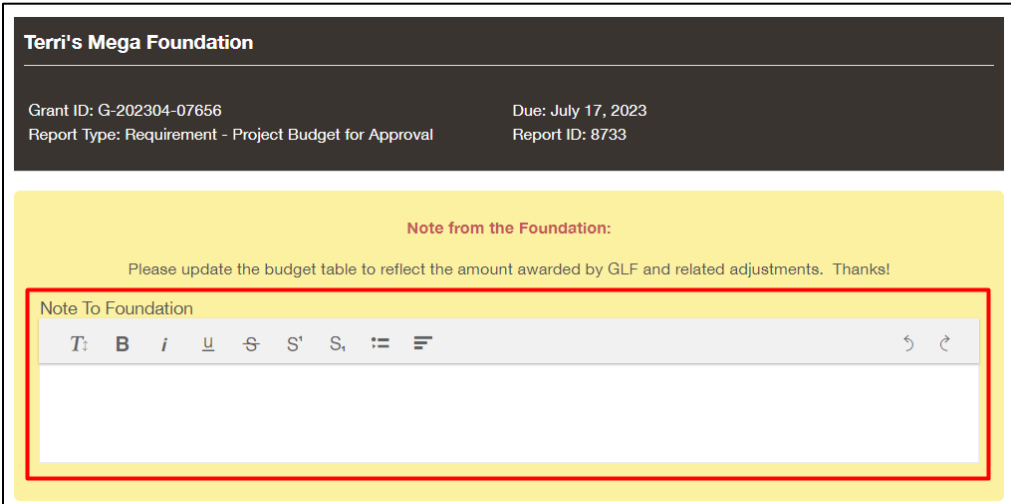
- 10) Should your program officer require additional information or documents, you'll receive an e-mail notification. When you log in, the requirement will now be found in “Requirements to Edit”. Repeat the process previously described to access the requirement, by clicking the update bar to view, and selecting the returned report. Because the ball is in your court, you have edit access to make the required updates. Click **Edit** to open the requirement. You'll see the note

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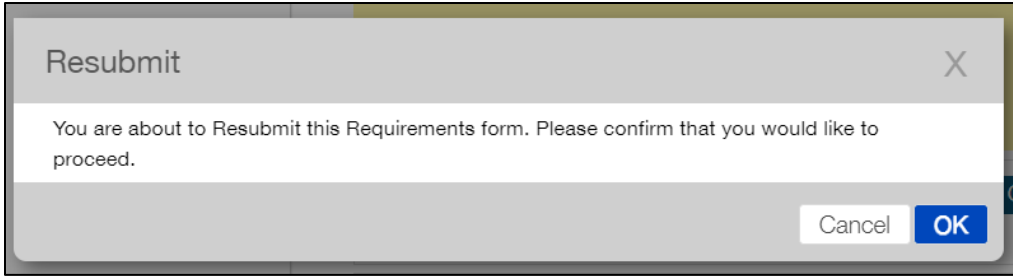
from GLF, in a yellow field at the top, and a status change to “Returned to grantee”. It will explain what is needed from you.



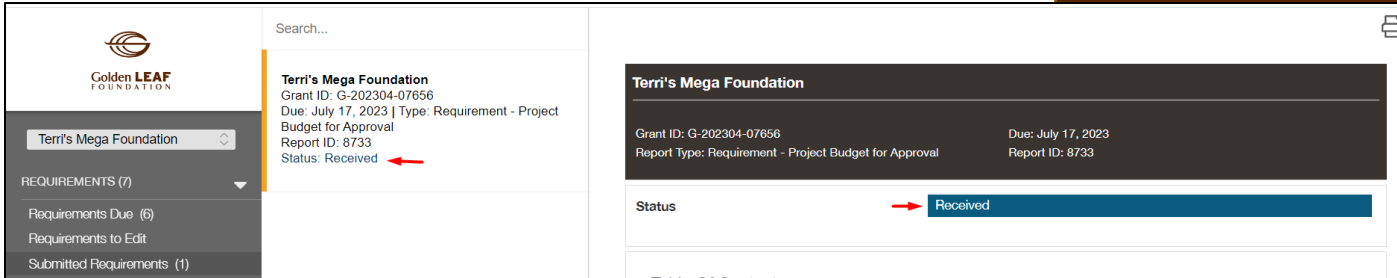
11) Upload any required documents (See [Uploading Documents for Requirements](#)), make comments back to your program officer in the “Notes to Foundation” field if needed, then click **Save and Close**, **Resubmit**, and finally, **OK**.



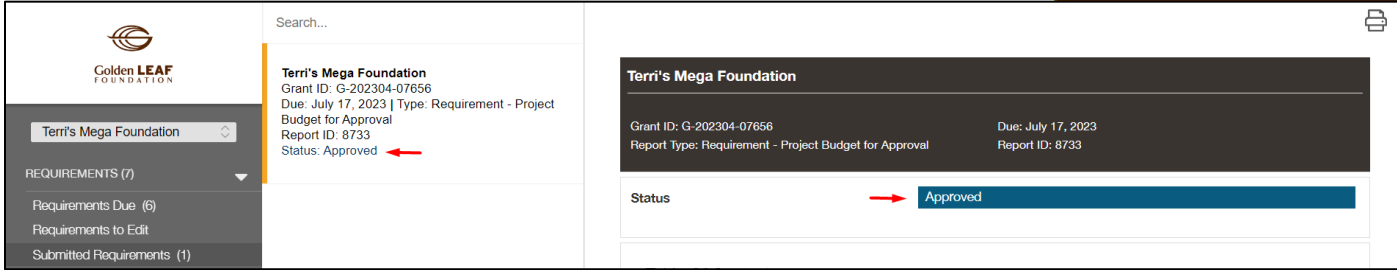
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12) In the “Submitted Requirements” section of the grant portal, you can follow the status of your requirement. When you’re not logged in to the grant portal, you’ll still receive e-mail notification of each requirement’s status, until...



CONGRATULATIONS! It's approved!



At this point, the approved report will remain in your “Submitted Requirements” folder, in view-only status. Note also that previously submitted documents can’t be modified or removed. They can only be previewed.

Still have questions? Send your question(s) to grantportalhelp@goldenleaf.org or drop by virtual office hours (schedule posted [here](#)).

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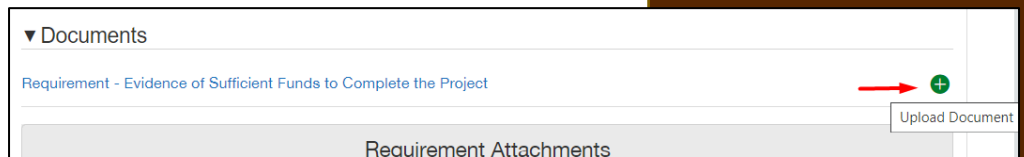
Uploading Documents for Requirements

You may upload documents to the portal in two ways:

- Drag and drop, or
- Select a file.

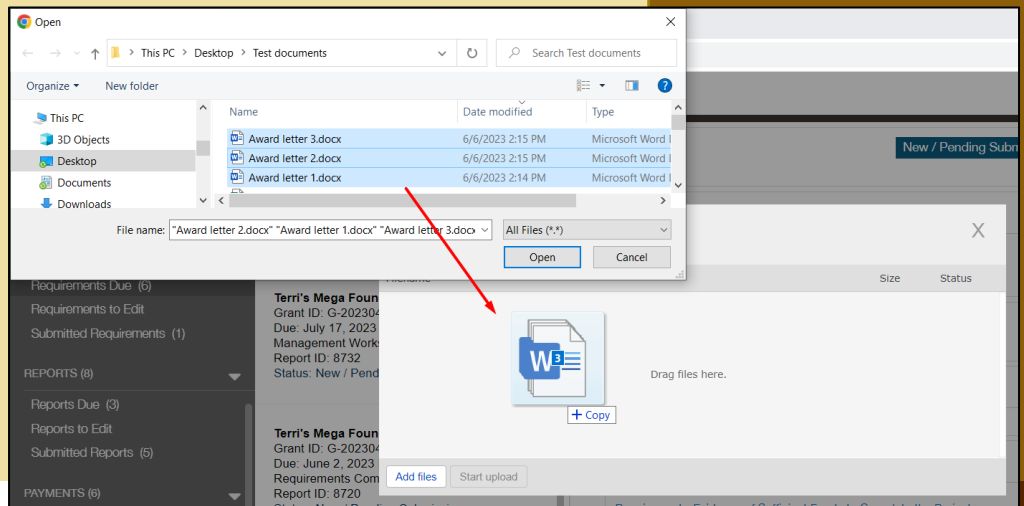
NOTE: For requirements, multiple documents must be uploaded at one time. Click and hold the CTRL key to select multiple documents before dragging or clicking Open to upload.

- 1) Click the **the +** icon to upload a document.

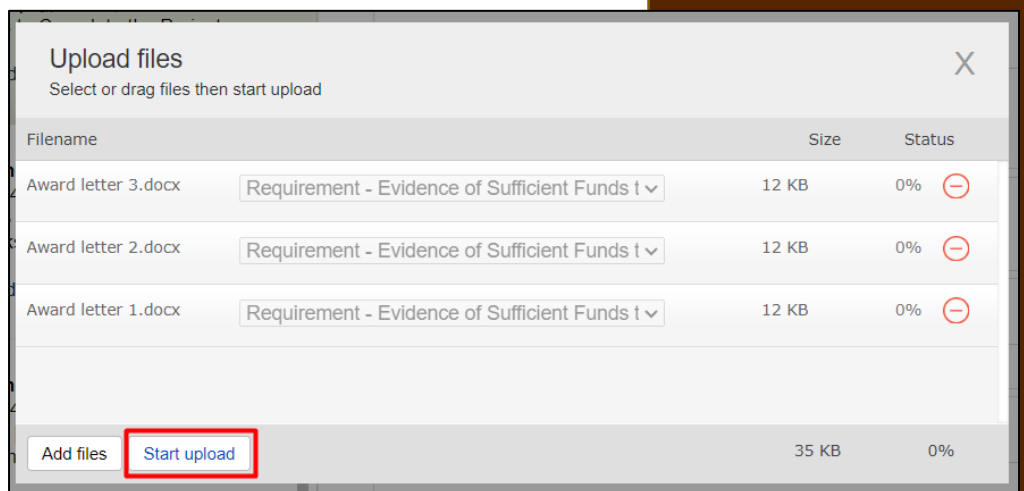


- 2) DRAG AND DROP the selected file(s) to the Upload files window.

To select multiple files, click and hold **CTRL**, then click each file you wish to upload. Release the CTRL key and drag files to the upload window.

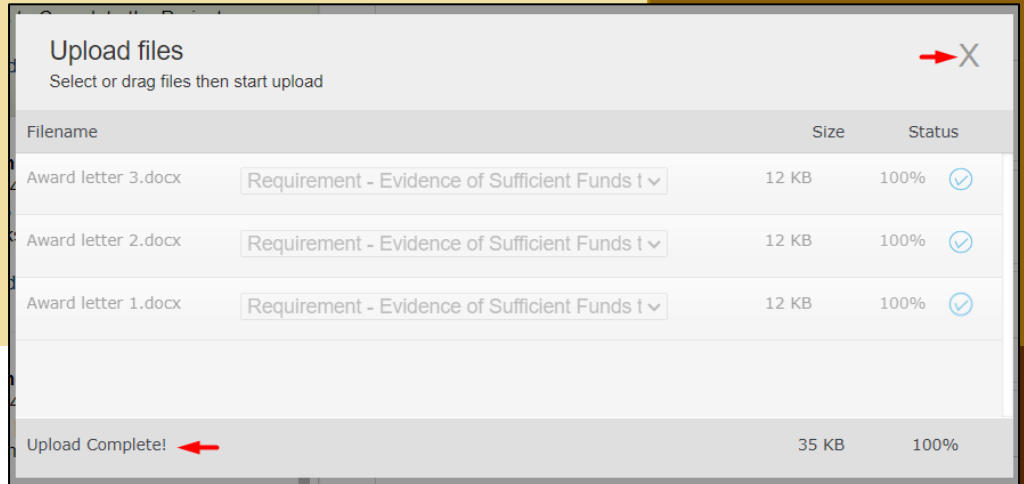


- 3) Click **Start upload**.



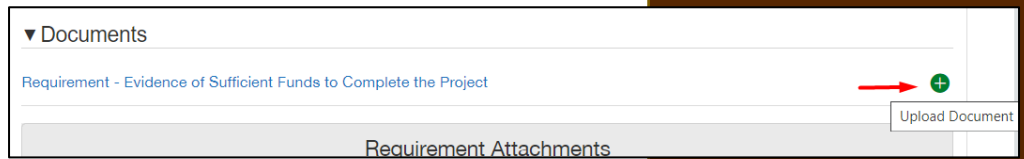
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- 4) When the upload is complete, close the window.



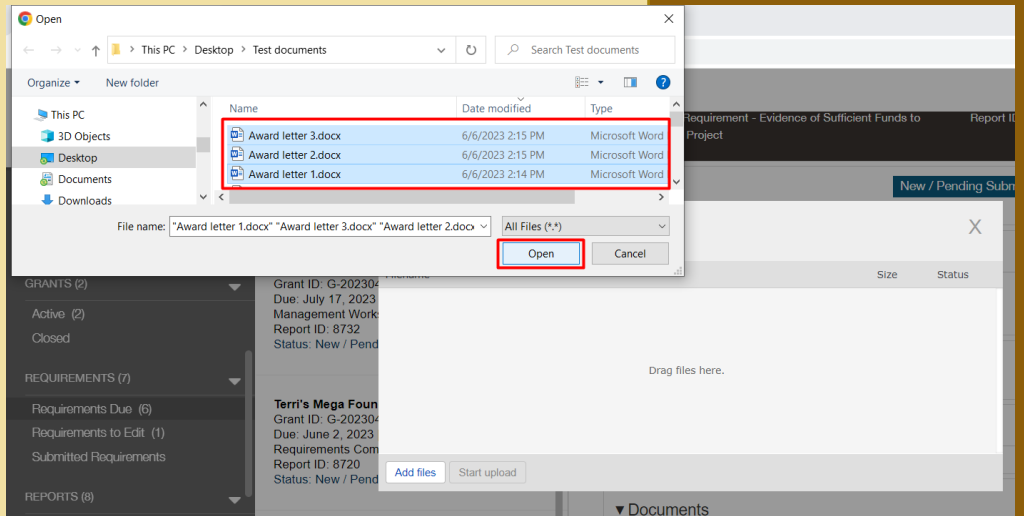
OR

- 5) Click the the icon to upload a document.



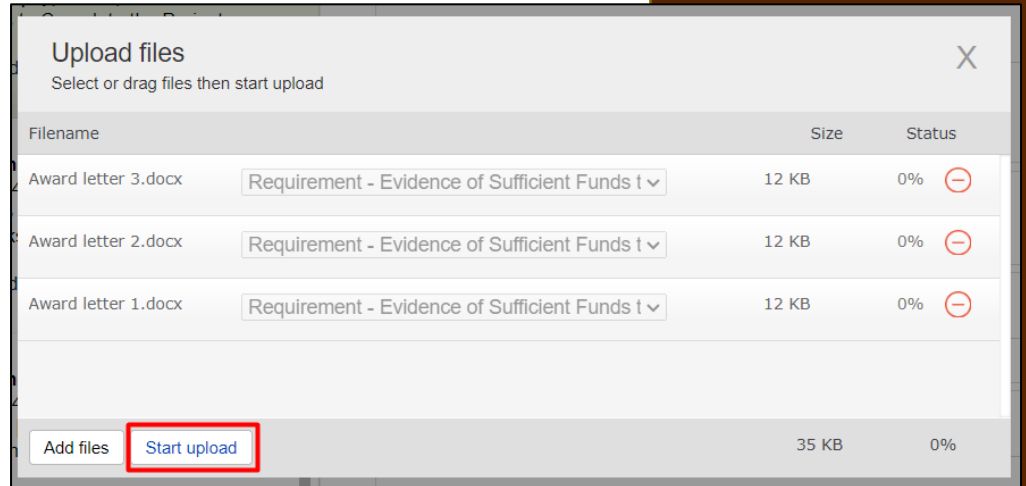
- 1) Click **Add files**. Select the file you wish to upload. Click **Open**.

To select multiple files, click and hold **CTRL**, then click each file you wish to upload. Release the CTRL key and click **Open**.

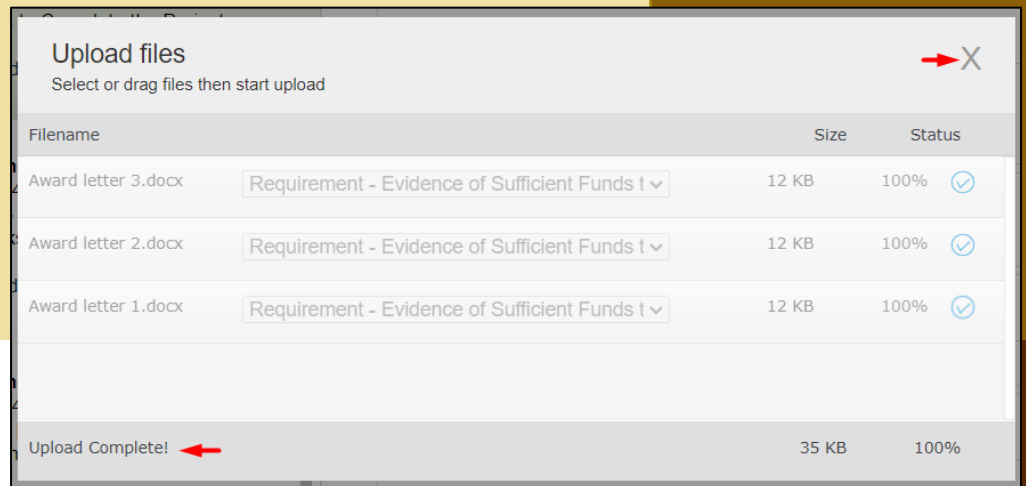


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2) Click **Start upload**.



3) When the upload is complete, close the window.



Still have questions? Send your question(s) to grantportalhelp@goldenleaf.org.